



A User Guide

Contents

What is RefWorks.....	3
Creating an account.....	4
Logging in	5
Adding references to your RefWorks library	6
Direct export	6
Importing references from the Imperial College Library Search	8
Using Import Filters.....	9
Adding references manually	10
Managing, organising and searching your references.....	11
Editing references	11
Global edits	11
Creating and Organising Folders.....	13
Searching and sorting your library.....	15
Deleting and un-deleting references	15
Adding attachments.....	15
Finding duplicate references.....	16
Sharing your references.....	16
Adding shared references to your RefWorks library	17
Write-N-Cite	18
Installing Write-N-Cite 4	18
Creating a reference list in your word processing document using Write-N-Cite 4.....	20
Editing in-text citations using Write-N-Cite 4	22
Creating a reference list in your word processing document using One Line/Cite view.....	23
Creating a reference list using RefWorks.....	24
Output Styles.....	25
Backing up your RefWorks library.....	26
Restoring your RefWorks Library	27
Creating group accounts	28
Using your group account with Write-N-Cite	29
Alumni Accounts	30
Help with RefWorks	30

What is RefWorks

RefWorks is a reference management software package that enables you to:

- Download references from online databases and e-journals.
- Create your own library of relevant references.
- Organise, sort and search your reference library.
- Insert correctly formatted citations from your RefWorks library into word processing documents.
- Format in-text citations to generate a reference list in a variety of output styles; including Harvard, Vancouver and hundreds of others.
- Share your folders of references with colleagues and friends.

RefWorks is a web-based package that can be used from any computer with an internet connection. It is particularly useful for undergraduates and taught-course postgraduates preparing projects and dissertations.

RefWorks is funded by the Library and is a free service to our users.

Creating an account

If you are a new user, go to the **RefWorks** section of the **Reference Management** pages on the library website. Click on the log in to RefWorks link and enter your College username and password to create your account.

You will be taken to the **New User Information** screen.

The screenshot shows a 'Create Account' form. At the top, there's a link to 'Automatically Login to your RefWorks Account from your institution'. Below it, instructions for 'New to RefWorks? Get started now with four easy steps:' are listed:

1. Enter your subscriber information.
Your Name:
Email Address:
Area of Focus: Select your focus area
2. Create a database by automatically importing data from online services or by typing references in manually.
3. Create a paper in your word processor inserting reference ID numbers in the locations you want to cite references. Save and close the file.
4. From RefWorks select Bibliography, Create and browse and locate the paper to format. Select the output style you want to use. Click Create Bibliography and save your formatted paper to your computer.

At the bottom, it says 'That's it...your paper is formatted correctly and the bibliography automatically created.' and features a 'Create Account' button with a green plus sign icon.

Enter your name and College email address in the boxes provided.

Select your **Area of focus** from the drop down menu options (e.g. engineering, life sciences).

Select your **Type of User** from the drop down menu options (e.g. undergraduate, postgraduate taught course).

Click on the **Create Account** button.

You will receive an email confirming your registration details.

You are now ready to start using RefWorks!

Logging in

Once you've created your RefWorks account you will continue to log in using your College username and password.

When you reach the RefWorks log in screen *always* click on the **My Institution's Credentials (Shibboleth)** link.

New to RefWorks?
[Sign up for a New Account](#)

Login using RefWorks credentials

Imperial College London ([not my institution](#))

Login Name

Password

[Forgot your password?](#)

Login using other credentials

[Athens credentials](#)
[My Institution's credentials \(Shibboleth\)](#)

A blue callout bubble points from the text "Click 'My Institution's credentials (Shibboleth)' and select Imperial College from the list" to the "My Institution's credentials (Shibboleth)" link.

You may be asked to identify your institution, in this case select **Imperial College London** from the list of options.

Login with your College username and password when asked to do so.

Adding references to your RefWorks library

There are various ways to do this:

- Use the Direct Export feature available in many online resources such as ScienceDirect and Google Scholar.
- Import references from the Imperial College Library Search.
- Save references in a file and import into RefWorks using an **Import Filter**.
- Add references manually.

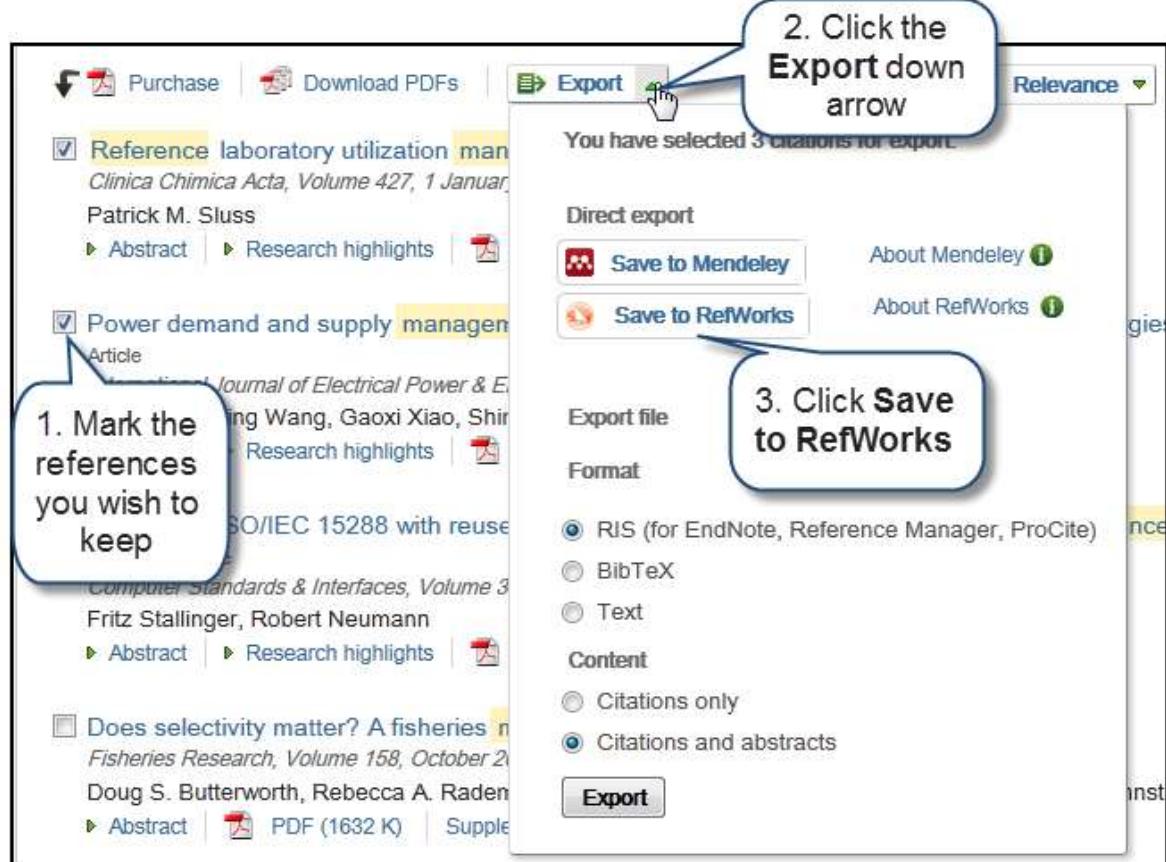
Direct export

Several online resources have a **Direct Export** feature allowing you to export references into your RefWorks library quickly and easily.

- Conduct your search and mark the references you wish to keep.
- Find the **Export** or **Send** button that will allow you to export the selected results to reference manager software. (N.B. the button name may vary depending on the resource you're searching.)
- Select the option to export to RefWorks.
- Log in to your RefWorks account when prompted to do so. The selected references will be downloaded into your library.
- Click on the **View Last Imported Folder** link to view the references.

For instructions on using Direct Export with your chosen online resource please visit the RefWorks Importing from Online Data Vendors help page.

This example of **Direct Export** uses **ScienceDirect**, but the process is similar for many other online resources.



Importing references from the Imperial College Library Search

You can search the Imperial College Library Search via RefWorks and import references directly into your library.

- From the RefWorks **Search** menu select **Online Catalog or Database**.
- Select **Imperial College London** from the drop down list.
- Under **Quick Search** type search terms into the box and click **Search** button.
- Alternatively click the **Advanced Search** bar for additional options.
- To add extra fields to the **Advanced Search**, click on the green plus symbol.
- Select the items to be imported, select a folder to import into if applicable, and click the **Import** button.
- Click on **View Last Imported Folder** to see your references.

The screenshot shows the RefWorks software interface with four numbered callouts:

- 1. From the Search menu select Online Catalog or Database**: Points to the "Search" menu in the top left corner.
- 2. Select Imperial College London from the drop down menu**: Points to the dropdown menu under "Search Online Catalog or Database" where "Imperial College London" is selected.
- 3. Enter search terms in either the Quick Search or Advanced Search box and click the Search button**: Points to the "Enter Search Terms" field in the "Quick Search" section.
- 4. Select the references you want by ticking the box and click the Import button**: Points to the checkbox next to the first reference in the "Search Results for Advanced Search" list.

Search Results for Advanced Search

References to Use: Selected (Note that references are also put in the Last Imported folder)

Import to Folder...

Reference 1 of 24

Ref ID: 2 Book, Whole Reference 2 of 24

Authors: Gibbons, Susan; American Library Association

Book Title: The academic library and the net gen student: making the connections

Source: 2007, 119, American Library Association, Chicago

Import New Search

Using Import Filters

With some online resources you cannot export references directly into RefWorks. Instead you must save the references in a file and then import them into RefWorks.

For instructions on using **Import Filters** with your chosen online resource please visit the RefWorks Importing from Online Data Vendors help page.

The library has created instructions for importing references from the following resources:

ACM

Google Scholar

Nature

OnePetro

PubMed

Reaxys

SciFinder

SpringerLink

These are available on our website at **Learning Support – Reference Management – RefWorks** by selecting the **Add References** tab.

Adding references manually

- From the RefWorks **Reference** menu select **Add new**.
- In the **Fields Used by** box select your preferred output style, e.g. Harvard. The fields used by this style will now appear at the top.
- Select the appropriate **Reference Type**, e.g. Journal Article from the drop down menu.
- Enter author names as surname, forename or initial, e.g. Smith, J. or Smith, James.
- Multiple authors should be separated by a semicolon, e.g. Smith, J.; Jones, P.; Brown, L.
- Corporate authors should be entered as they appear, e.g. Department of Health.
- Click on **Additional Fields** and select either **Print** or **Electronic** as your **Source Type**.
- For further help and information on the output style or RefType click on the **Additional Comments** bar.
- Once you've completed all the relevant fields click on **Save Reference**.

N.B. If you are using Internet Explorer 9 you must enable Compatibility View in order to manually add and edit references.

The screenshot shows the 'Add New Reference' dialog box. At the top, it displays 'Fields used by' set to 'Imperial College - Harvard' and 'and Reference Type' set to 'Web Page'. Below this, there are fields for 'Authors', 'Title' (with rich text editing tools), 'Accessed, Year', 'URL', and 'Retrieved Date'. Further down are 'Add to folder' (dropdown menu), 'Attachments' (Browse button), and 'Additional Fields' section. The 'Additional Fields' section includes 'Source Type' (radio buttons for Print and Electronic) and a link to 'Additional Comments about Imperial College - Harvard'. At the bottom are 'Save Reference' and 'Save & Add New' buttons.

1. Select your output style
2. Select the appropriate Ref Type
3. Complete the appropriate fields in the **Fields used by:** section, then click **Save Reference**
4. Click on **Additional Fields** to select the **Source Type**

Click on Additional Comments for more help and information

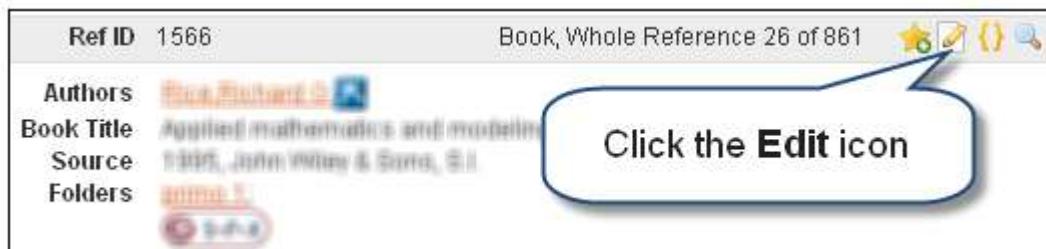
Managing, organising and searching your references

Editing references

N.B. If you are using Internet Explorer 9 you must enable Compatibility View in order to manually add and edit references.

To edit a reference:

- Click on the **Edit** icon on the right hand side of the reference.
- The reference will then be displayed in full and you can add, edit or delete information.
- Click **Save Reference** when you've finished or your changes will be lost.



Global edits

The global edit feature allows you to add, move, delete or replace data in a number of references in one go.

To use global edit:

- Select the references you wish to amend and click the **Global Edit** icon.
- In the **Global Edit** window select the appropriate section; **Add, Move, Delete, Replace**.
- Select the field to wish to edit from the drop down menu.
- Click on the **Add, Move, Delete or Replace** buttons to save the changes.

For further instructions on using Global Edit please visit the RefWorks Editing Multiple References help page.

References Organize & Share Folders

References to Use
Selected Page All in List

Sort by: Created Change View: Standard View

Ref ID: 1583
Authors: [William, David](#)
Title: [Cost performance research](#)
Source: [Nature](#), 2011, news
Folders: [Last imported](#)

Ref ID: 1582
Authors: [David, Pearce, Alan, Philip, Freeman](#)
Book Title: [Economics for Business](#)
Source: [2010, 4&5, McGraw-Hill Higher Education, London, 3](#)

Ref ID: 1581
Authors: [William, David](#)
Book Title: [Economics](#)
Source: [2011, 716, McGraw-Hill Education, Maidenhead, 10th](#)

1. Select the references you want to edit and click the Global Edit icon

Global Edit

References to Edit: Selected (3)

Add ▾

Field to Add Data: Specific Field

Move ▾

Delete ▾

Replace ▾

Add Data Cancel

2. Select the appropriate section: Add, Move, Delete, Replace

3. Select the field(s) to edit from the drop down menu

- Choose Field...
- Choose Field...
- Abstract
- Accession Number
- Author Address/Affiliation
- Authors, Primary
- Authors, Quaternary
- Authors, Quinary
- Authors, Secondary
- Authors, Tertiary
- Availability
- Call Number
- Identifying Phrase

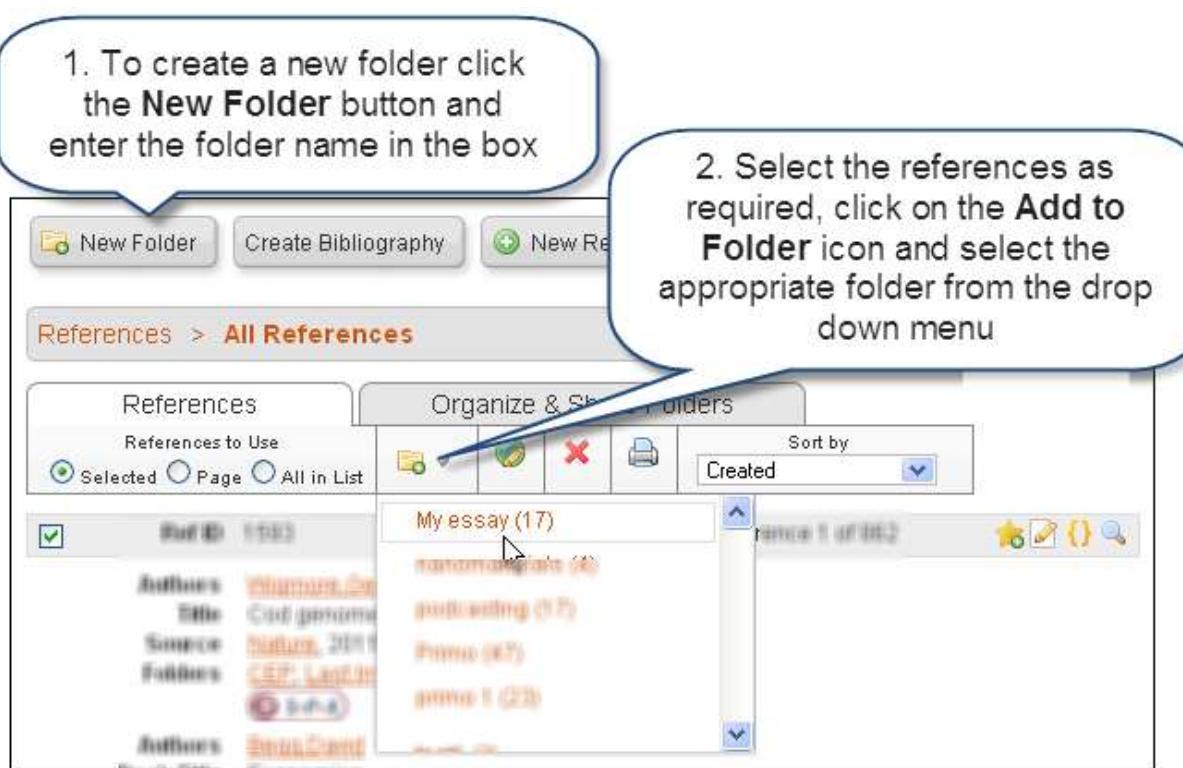
Creating and Organising Folders

You can create folders to keep references on the same subject, or for the same project grouped together. Note that all your references will remain in the **All References** list allowing you to view your entire library at any time.

References can be listed in more than one folder and you can create subfolders.

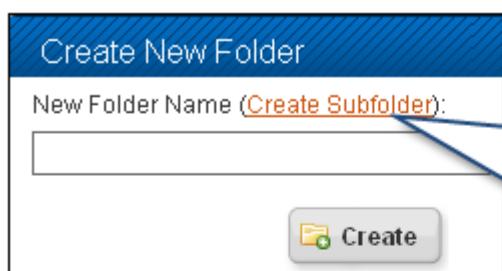
To create a folder:

- Click on the **New Folder** button near the top of the screen.
- Enter a folder name as required.
- Add references to a folder by ticking the boxes to the left of the reference, click on the **Add to Folder** icon and choose the folder required from the drop down menu. Or alternatively drag and drop the selected references, or the **Selected** button onto the folder list in the right hand **Quick Access** menu.
- To create a temporary list of references (for the duration of the session only) click on **My List** in the **Add to Folder** drop down menu. Or add references to **My List** individually by clicking the **Add to My List** star icon to the right of each reference.

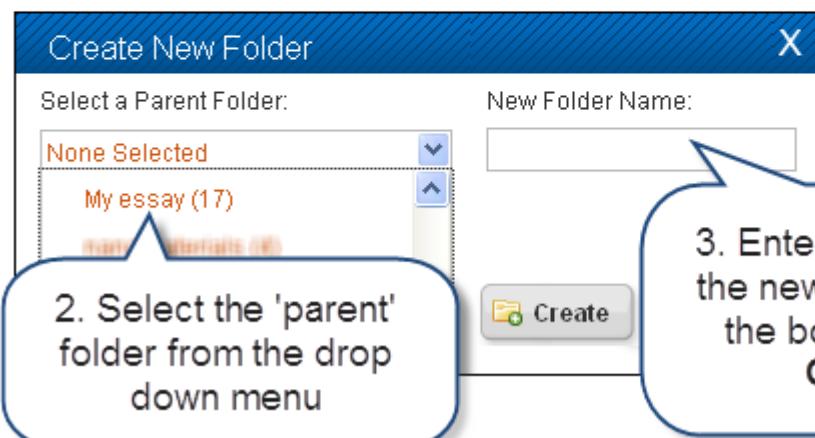


To create a subfolder:

- Click on the **New Folder** button near the top of the screen.
- Click on the **Create Subfolder** link and select the parent folder from the drop down menu.
- Type the name of the subfolder into the box and click the **Create** button.



1. To create a subfolder click on the **New Folder** button, then click **Create Subfolder**



2. Select the 'parent' folder from the drop down menu

3. Enter the name of the new subfolder in the box and click **Create**

Organising your folders:

You can organise your folders by selecting the **Organize & Share Folders** tab.

In the **Organize & Share Folders** screen you see the folder/subfolder structure and how many references are in each folder or subfolder. You can also create, rename, empty and delete a folder by *right clicking* on the folder name. If you delete a folder you do not delete the references it contains.



Searching and sorting your library

There are various options for searching and sorting your library.

Use the **Sort By** drop down menu to change the order in which your references are displayed. You can sort alphabetically by author, title or by reference type (book, journal etc.).

In the **Search** menu select **Advanced**. You can choose to search your entire library, search the data in specific fields, or limit your search to specific folders.

There is also a **Look Up** feature in the **Search** menu which lists the authors and journal titles which appear in your library.

Deleting and un-deleting references

To delete a reference:

- Select the reference(s) you wish to delete.
- Click the **Delete** icon.
- The deleted reference(s) will be moved to the **Deleted References** folder for 30 days, after which they will be permanently removed from your library.

To un-delete references:

- From the **View** menu select **Deleted References**.
- Select the references to be un-deleted.
- Click the **Restore** icon.
- Your references are returned in their original state to their original location in your database.

Adding attachments

To add attachments to references you must be in Edit mode.

- Click on the **Browse** button next to the **Attachment** box.
- Select the document you wish to attach.
- Click on **Add Attachment**.

A paperclip icon is displayed next to a reference with an attachment.

You have a maximum of 100Mb of server space for attachments. There is a limit of 20Mb per attachment.

Finding duplicate references

Occasionally you may add the same reference to your RefWorks account more than once. RefWorks can help you identify and delete duplicate entries.

Be careful not to delete any references you've already inserted in documents using Write-N-Cite as this can cause problems if you need to do further editing.

From the **View** menu select **Duplicates** and select either **Exact Match** or **Close Match**.

Exact Match looks for matching title, year & author and is case sensitive so would not match Harrington, H. for Harrington, h.

Close Match looks for matching title, year & author and is not case sensitive.

To check for duplicates in a specific folder click on the **Organise & Share Folders** tab and right click on the name of the appropriate folder.

Sharing your references

RefWorks allows you to share folders, or your entire library with colleagues.

To share your references:

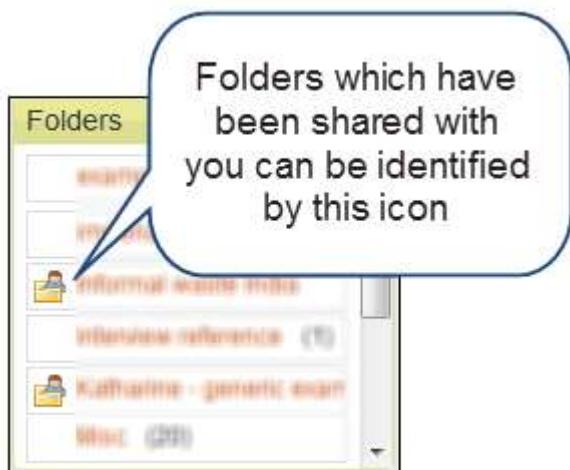
- Click on the **Organise & Share Folders** tab.
- Select the folders that you want to share and click the **Share** icon on the far right.
- Set the level of access that you wish to allow.
- Save the setting.
- Email the automatically generated URL to your colleague(s).



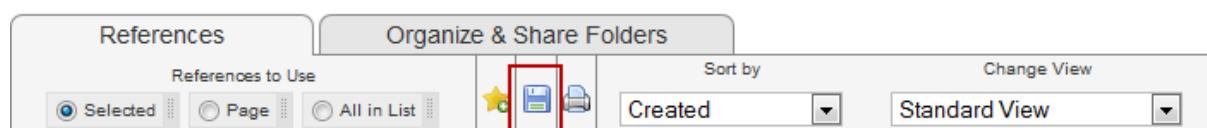
Adding shared references to your RefWorks library

If you receive a message inviting you to view shared references simply copy and paste the URL into your browser. This will launch **RefShare** and references in the shared folder will be displayed.

To view a shared folder in your own RefWorks library log into your RefWorks account. Shared folders are displayed in the **Quick Access** bar and can be identified by the sharing icon.



To save shared references into your RefWorks account select them and click the **Save** icon in the **References** tab.



Write-N-Cite

Write-N-Cite (WNC) is a plug-in which can be downloaded from RefWorks from the **Tools** menu. All PCs in the Library and those in most departmental clusters have Write-N-Cite 4 pre-loaded.

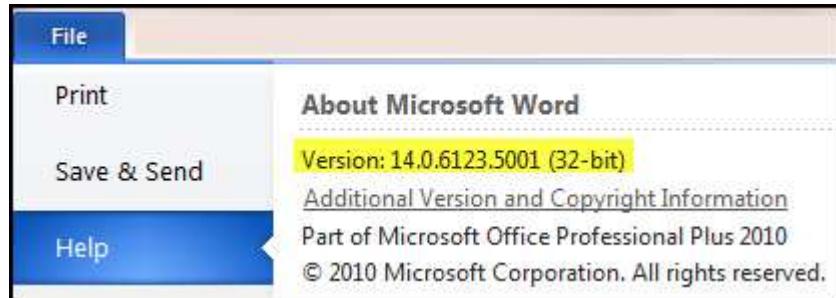
To install Write-N-Cite on your personal computer you must have administrator rights. There are versions of Write-N-Cite for PC and Mac, make sure you download the correct version.

Installing Write-N-Cite 4

N.B. Windows users may be given the option of downloading the **32bit** or **64bit** installation. In order to select the correct one you need to know if you are running the 32bit or 64bit version of Microsoft Office

Word 2013: Open the **File** menu and select **Account**. Select the **About Word** button to find version details.

Word 2010: Open the **File** menu and select **Help**. Version details are provided in the **About Microsoft Word** information.



- Select **Write-N-Cite** from the **Tools** menu in RefWorks.
- Select the correct installation version. Versions are available for Windows and Mac.
- Click on the **Download now** button for the version of Write-N-Cite you wish to install and save the .exe file.
- Copy the **Login Code** provided on the Write-N-Cite download page in RefWorks as this will be required to access your references. The code expires after four hours, but a new code is always available from the Write-N-Cite download page in RefWorks.

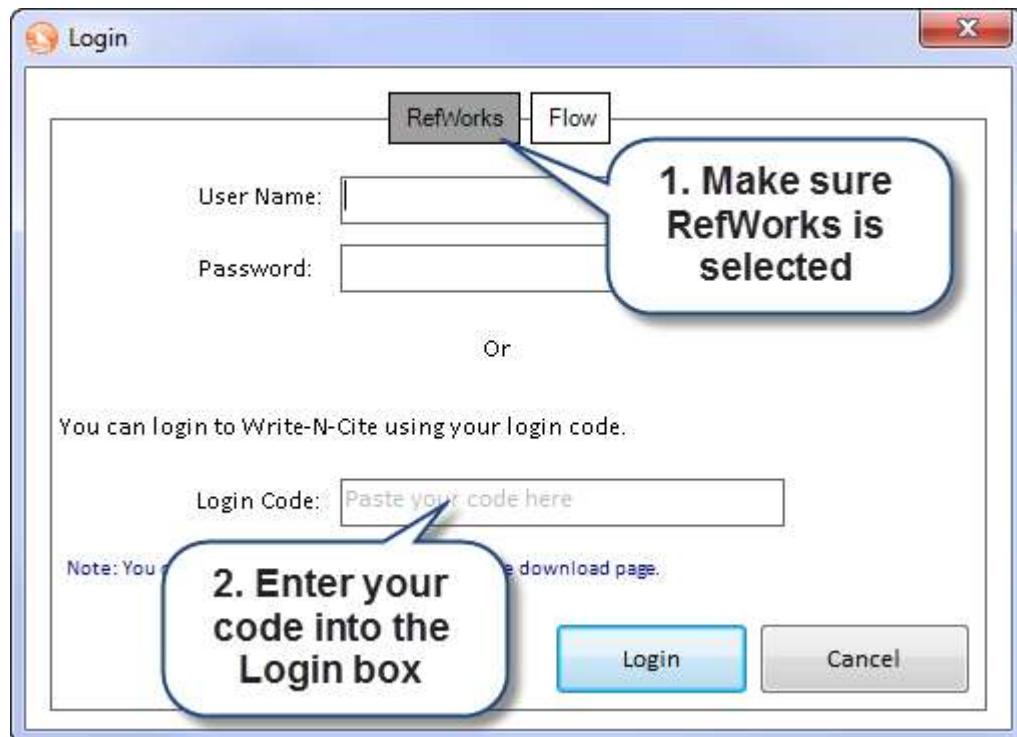
How do I log into Write-N-Cite 4 using my institution credentials?

If you use your institution's credentials (Athens, Shibboleth or Proxy) to log in to RefWorks, you **MUST** copy and use this code on the Write-N-Cite 4 login screen

```
455b7244567646536253556f42140b1108151d522833260015312  
12717171a5331340a6c00227d2a560f373d32210d68103b224200  
17102f60
```

Copy the login code

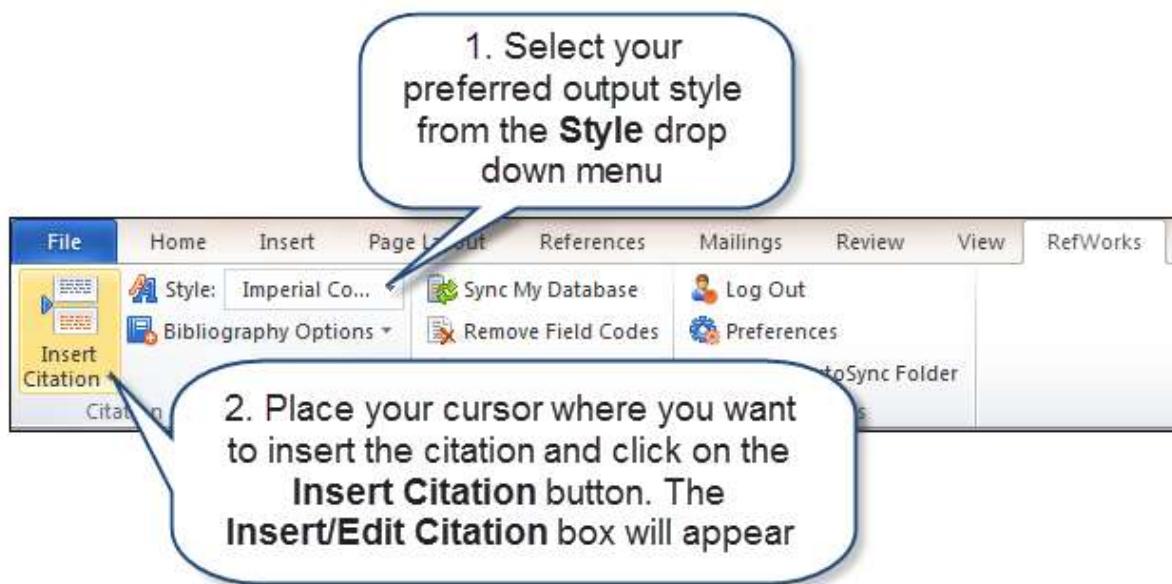
- Make sure that **Microsoft Word** is not running before installing Write-N-Cite.
- Once installation is complete a tab labelled **ProQuest** will appear in the **Microsoft Word** ribbon. Mac users may need to enable the **ProQuest** toolbar by clicking on the **View** menu and selecting **Toolbars** and **ProQuest**.
- To access your references select click on the **Log in** button on the **ProQuest** tab, make sure **RefWorks** is selected and paste the login code into the box provided.



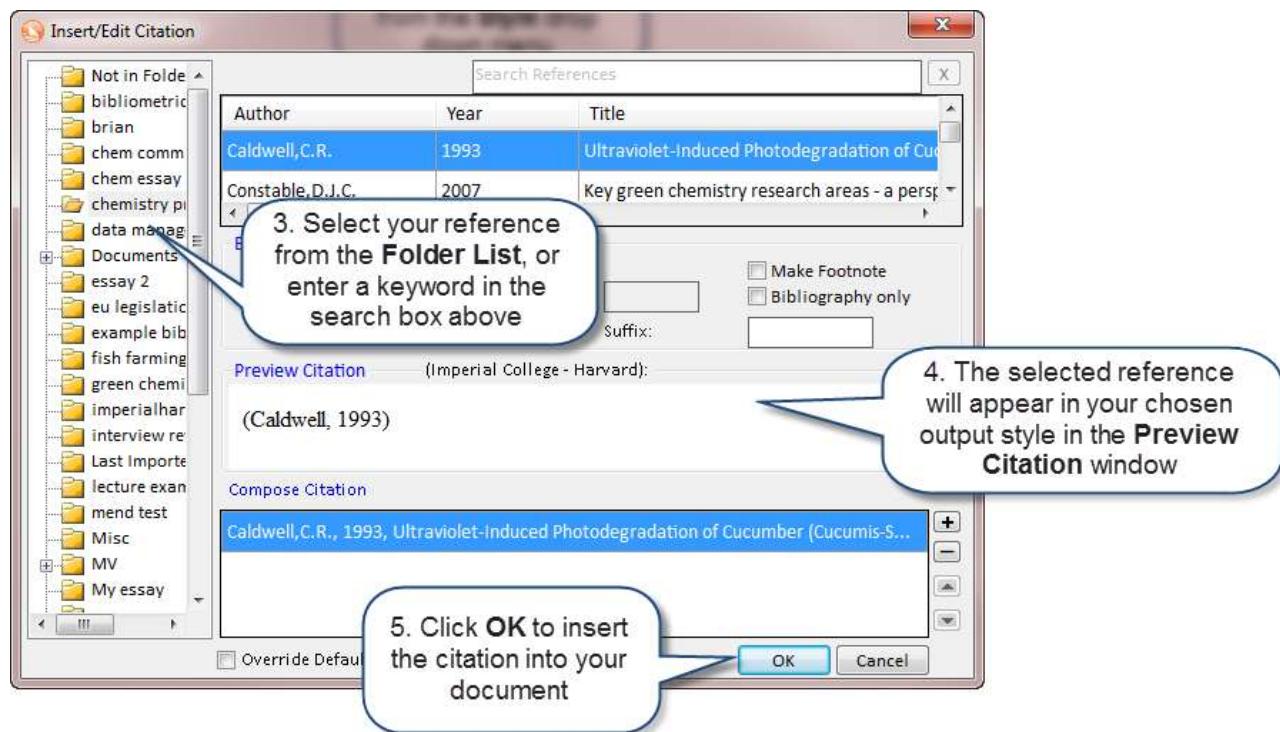
- Syncing your references may take a minute or two.
- Once you've logged in the name of the tab will change from **ProQuest** to **RefWorks**.
- For more information on Write-N-Cite, including help with troubleshooting common errors see the Write-N-Cite frequently asked questions.

Creating a reference list in your word processing document using Write-N-Cite 4

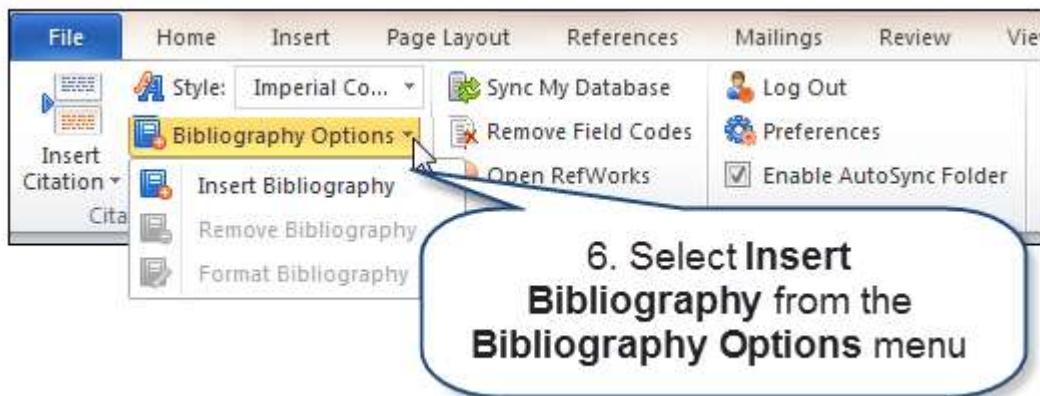
- Open a document in Microsoft Word and click on the **RefWorks/ProQuest** tab in the Word ribbon.
- If you have not logged into Write-N-Cite you will need to obtain a login code from RefWorks. Log into your RefWorks account and from the **Tools** menu select **Write-N-Cite**. Copy the log in code, go back to Word and paste the login code into the box provided. Syncing your references may take a minute or two.
- Select your preferred output style from the **Style** drop down menu. If your preferred style is not listed click on **Select Other Style** for more options. Imperial College specific styles can be found under the **Group Favourites** heading.
- Place your cursor where you want to cite a reference within the document and click on the **Insert Citation** icon in the RefWorks tab. The **Insert/Edit Citation** box will appear.



- Select the citation you wish to insert either by opening the appropriate folder from the **Folder** tab, or by typing a keyword into the search box in the top right hand corner.
- The selected citation will be displayed in your chosen output style in the **Preview Citation** window. To insert the citation into your Word document click the **OK** button.



- To insert additional references into a single citation click the + icon next to the **Compose Citation** window and select another reference to add to the citation. The order in which references appear in the citation is determined by your output style.
- When you've added all your references put your cursor where you'd like your bibliography to appear and click on **Bibliography Options** in the **RefWorks** tab. Then select **Insert Bibliography**.

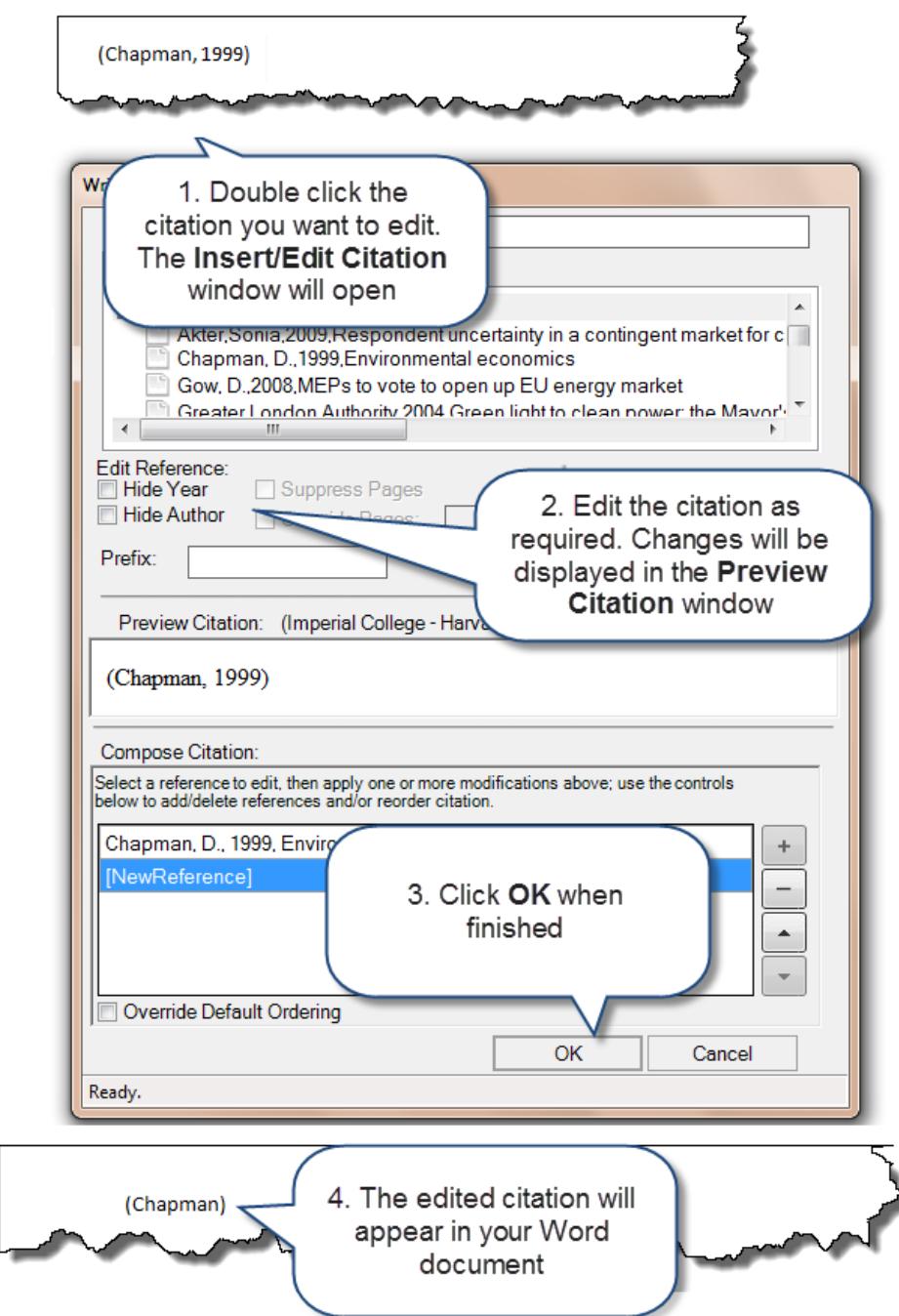


N.B. if you have added new references to your RefWorks account and want to cite them in a document you will need to click on the **Sync My Database** button in the **RefWorks** tab. Syncing your references may a minute or two.

Editing in-text citations using Write-N-Cite 4

If you are using Harvard, or a similar author-date output style, you can edit your in-text citations and add or remove text. This is useful if you wish to add a page number, or hide the author's name.

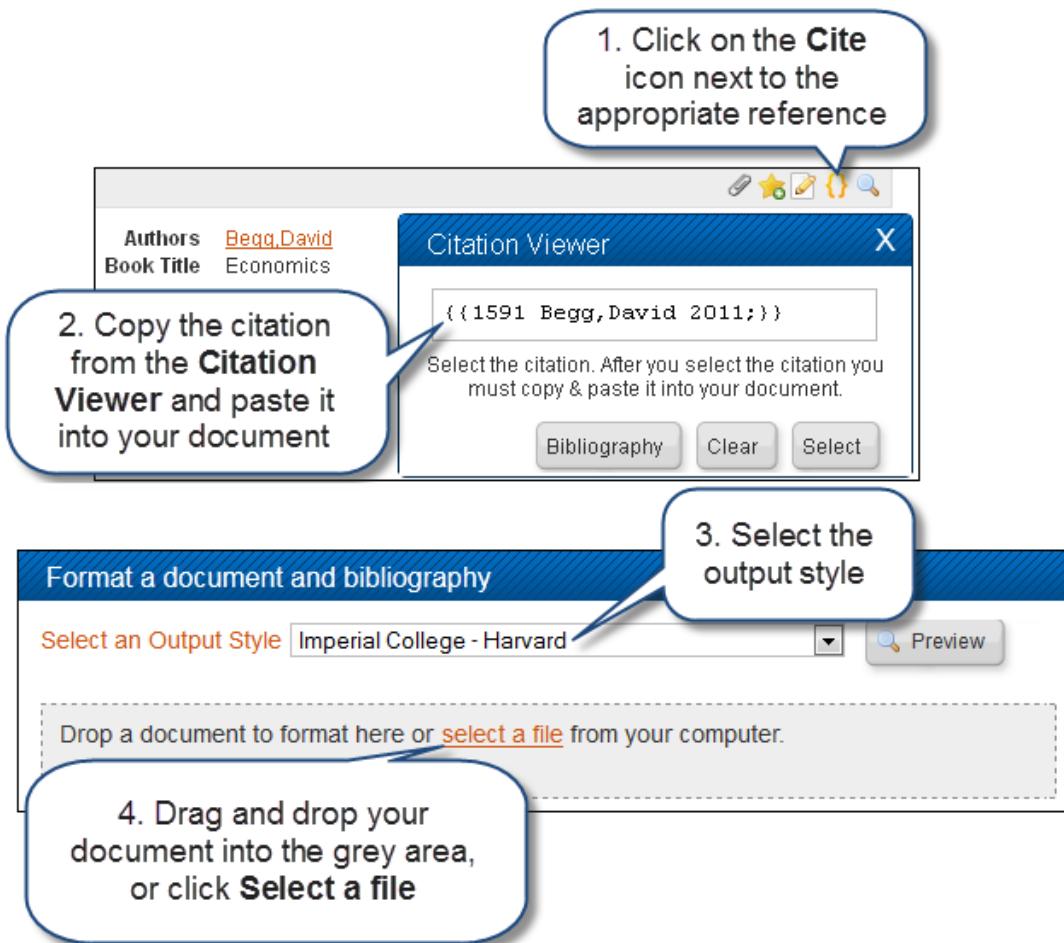
- Open your document and double click on the citation you wish to edit. The **Insert/Edit Citation** box will appear.
- Use the options in the **Edit Reference** area to hide the year or author. Or add a page number in the **Suffix** box.
- Click on **OK** to insert your edited citation into your Word document.



Creating a reference list in your word processing document using One Line/Cite view

You can use One Line/Cite View to insert in-text citations and format references in a word processing document without using Write-N-Cite.

- Log into your RefWorks account.
- Click on the **Cite** icon next to the appropriate reference. A **Citation Viewer** window will appear containing the formatted citation.
- Click **Select** and copy and paste or drag and drop the citation into the right place in your document.
- **Clear** the Citation Viewer window before creating your next citation.
- Save your document once all the citations have been added.
- In RefWorks go to the **Bibliography** menu and select **Format Document**.
- In the **Format Document** window select the output style you require and either drag and drop your document into the grey area, or click **Select a File** and navigate to your document.
- A copy of your document will be created containing the formatted citations and bibliography.

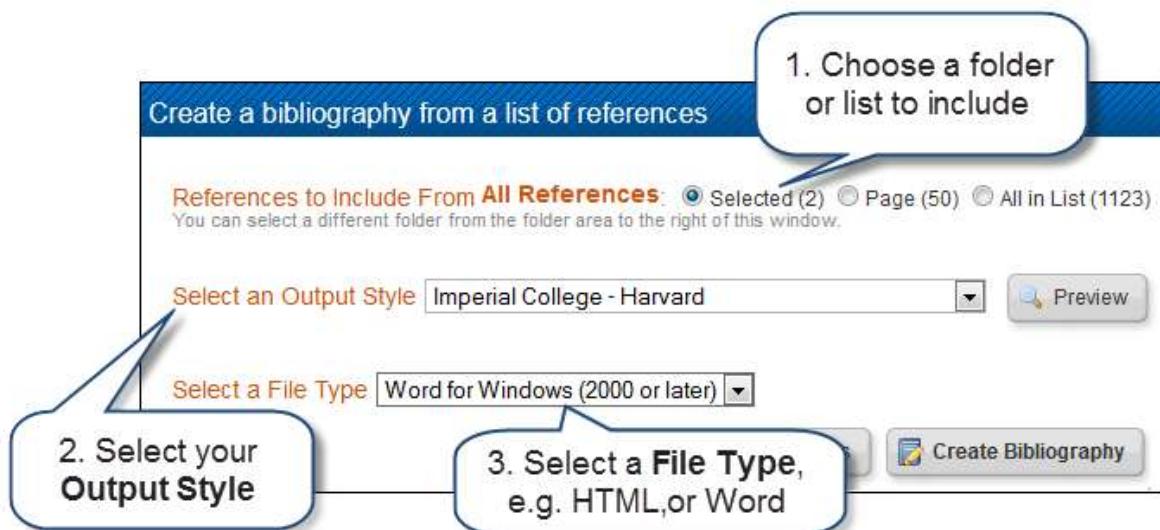


Creating a reference list using RefWorks

RefWorks can still generate a bibliography without using Write-N-Cite.

- In RefWorks create a new folder containing all the references required in your bibliography, or add them to **My List**.
- From the **Bibliography** menu select **Create Bibliography**.
- Select your preferred Output Style , e.g. Harvard.
- Select a folder or list from the **References to Include** options.
- Under **File Type** select **Word for Windows/Mac**.
- Click on **Create Bibliography**.

This will now format the references from that folder or list in a Word document.



Output Styles

The output style will determine the format of both your in-text citations (if you're using Write-N-Cite) and your reference list. The output style decides which fields will be displayed in your reference list, in what order, whether footnotes will be included and much more.

RefWorks has many hundreds of output styles to choose from. Before using RefWorks to generate your reference list you should check which output style your department prefers you to use. Using the wrong style may lose you marks.

Output styles can use different fields to format references. Therefore it's advisable to decide on your preferred output style as soon as possible rather than edit your reference list to 'fit' an output style later on.

You can create your own list of favourite styles for quick access.

- In RefWorks select **Output Style Manager** from the **Bibliography** menu.
- Scroll down to view the list of styles available.
- Select the style you require and use the arrows to add or remove it from your **Favourites** list.
- Click on **Preview Output Style** to view an example bibliography using your chosen output style.

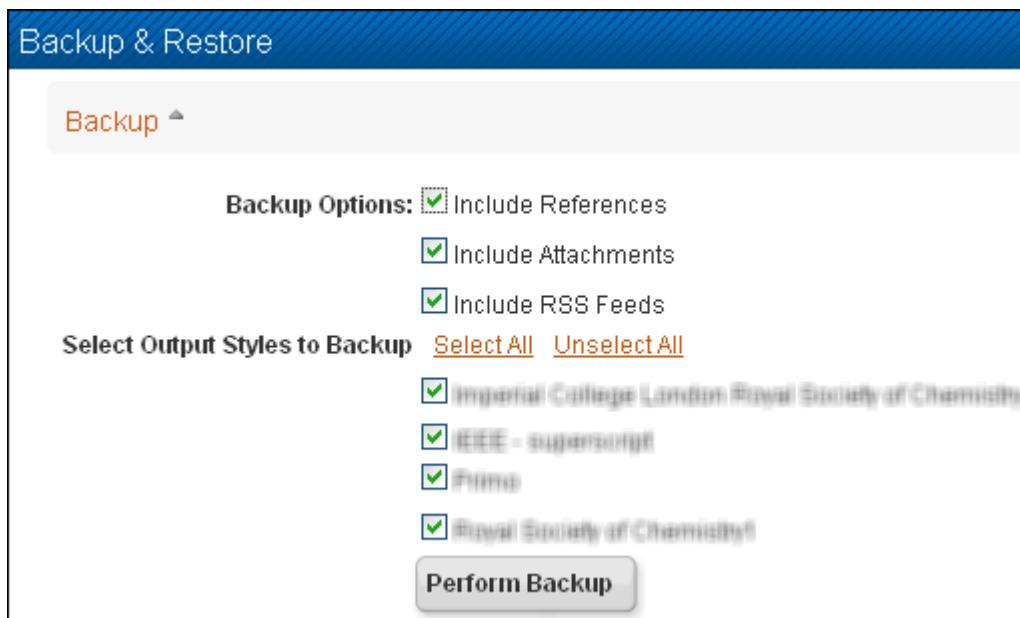
The Library has created an Imperial College version of the **Harvard** and **Vancouver** output styles for RefWorks. Further guidance and examples can be found on the Library website on the Reference Management pages.

Backing up your RefWorks library

A copy of your RefWorks library is saved on the RefWorks servers, but it is a good idea to back up your library from time to time.

- Log in to your Imperial College London RefWorks account.
- From the **Tools** menu select **Backup & Restore**.
- By default, **Include References**, **Include attachments** and **Include RSS Feeds** are selected. If you do not want to include any of these, deselect them.
- By default, all custom **Output Styles** (i.e. Output Styles you have created or edited) are selected to backup. You can deselect any or all custom output styles.
- Click on **Perform Backup**.
- Save the file when prompted. If you are not prompted to save the file, click the link that says **Click here to save your backup file** to download the backup to your computer.

Your backup file will be saved as a .zip or .rwb file. Please do not change the extension of the file as it is necessary to restore if you need to do so later.

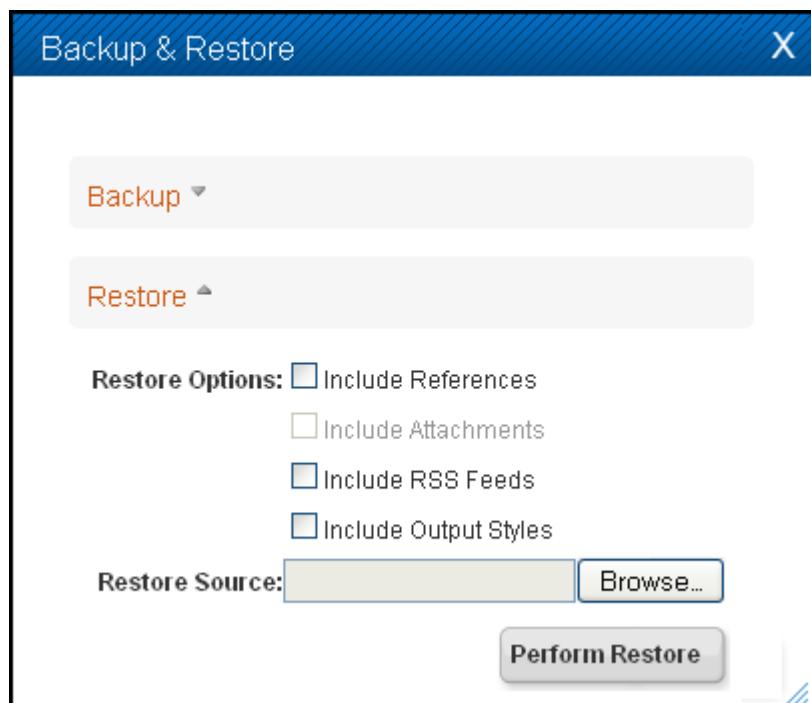


Restoring your RefWorks Library

N.B. Restoring will overwrite all of the references in your database. If you have added new references since you last performed a backup these will be overwritten.

N.B. Restoring Output Styles will overwrite styles with the exact same name and will add styles that you have created or edited.

- Log in to your Imperial College London RefWorks account.
- From the **Tools** menu select **Backup & Restore**.
- Click **Restore** to expand the restore options.
- Select **Include References, Include Output Styles, Include Attachments, Include RSS Feeds** as required.
- Click the **Browse** button to find the saved back up file.
- Click the **Perform Restore** button.



Creating group accounts

Group accounts can be useful if you are working with other people to produce a single report or essay. A group account will allow all members to add references to the same RefWorks library and cite and reference them in your document.

New group accounts must be created on campus in order to be associated with the Imperial College RefWorks subscription. Once the account has been set up it can be accessed both on and off campus.

To create your group account go to: <https://www.refworks.com/> and click on **Login**. You should also use this webpage to log into your group account from now on.

- From the log in screen click the **Sign up for a new account** link and the **Create New Account** window will open.



- In the **Create New Account** window enter an email address, which can be a group member's Imperial College email or personal email account.

When selecting a **Login name** and **Password** for a group account you should not use the College username and password of any group member for security reasons.

Once the group account has been created the Login name and Password can be circulated to all group members and you can start adding references to your RefWorks library. You can also transfer references between accounts using the share options found in the **Organize and Share Folders** tab.

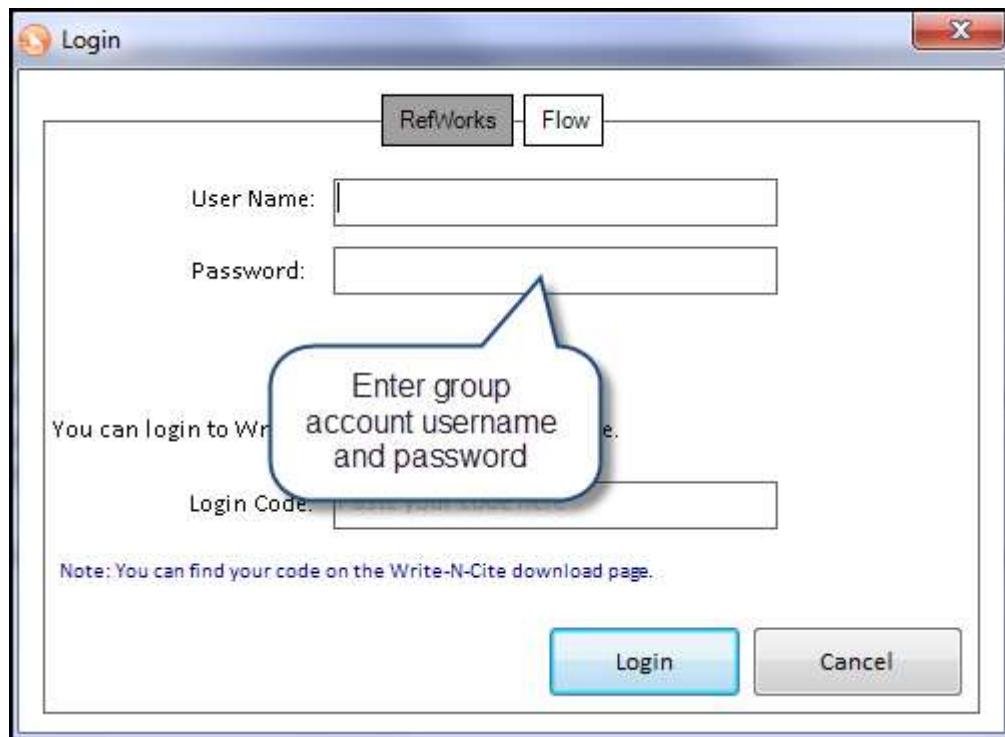
Using your group account with Write-N-Cite

Write-N-Cite (WNC) is a plug-in which can be downloaded from RefWorks via the **Tools** menu. Write-N-Cite allows you to insert citations and create reference lists in your documents using the references saved in your RefWorks library.

All PCs in the Library and those in most departmental clusters have Write-N-Cite pre-loaded.

If you are already logged into Write-N-Cite with your College RefWorks account you will need to log out and log in with your group account credentials.

- Open a Word document and click on the **RefWorks/ProQuest** tab.
- Enter your group account **Username** and **Password**.
- Syncing your references may take a minute or two.



Alumni Accounts

Imperial College London alumni may have free access to RefWorks for as long as the College maintains a subscription to this service.

As part of the RefWorks Alumni Programme, you are entitled to:

- One free RefWorks account.
- New updates and feature releases.
- 200 MB of file attachment storage.
- The ability to share your folder or account via RefShare.
- Free web-based training.
- Technical Support.

For details of how to set up your alumni account please contact your librarian.

Help with RefWorks

If you have any questions or require assistance using RefWorks please contact the library by using the ASK the Library button on the homepage or phone 020 7594 8810.

Visit the RefWorks pages on the Library website.

Attend a library training workshop on RefWorks. For a timetable visit the Learning Support - Workshops web pages.

The RefWorks community website has guides, documents and online tutorials which you may find useful <http://refworkscommunity.ning.com/>. RefWorks also have a number of short 'how to' videos available on YouTube.